

AUTOMATIC LEAD DISTRIBUTION AND PROCESSING CONFIRMATION
SYSTEM AND METHOD

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BACKGROUND OF THE INVENTION

10 1. Field of the Invention

15 This invention relates to the field of lead distribution and processing and more particularly to automatic lead distribution and processing confirmation systems and methods in a computer based environment.

2. Description of Background Art

20 Many businesses spend significant resources advertising their wares and services in order to attract clients. Oftentimes the success rate of many promotion activities such as direct mailings or cold-calls is low and inefficient. These direct mass mailings are frequently sent to users who have no interest or need for the advertised product or service. For example, an
25 advertisement for the latest computer software program will typically not be effective if sent to a person who does not own or use a computer.

To increase the effectiveness of a sales force and of advertising resources, many companies focus their resources on potential customers who are more likely to be interested in the products or services. With reference to a sales force these potential customers are often called ``leads.'' The current method of developing and using leads has many problems. One such problem is that it is often difficult to identify promising leads. Another is that even when a promising lead is identified the lead is frequently ``cold.'' An example of a cold lead is one that at one time was interested in a product or service but has since become less interested.

A related problem is that companies (lead aggregators) often have a large number of leads based upon a variety of sources, e.g., Internet or mail registrations, marketing responses, etc. Oftentimes, these companies cannot follow up with all of these leads and as a result many of the leads are not contacted or become cold by the time they are contacted. Not only does this result in a lost opportunity but the lead may be expecting to be contacted so a significant delay in contacting the lead may make the lead less likely to purchase or use a product or service and can result in a loss of good will.

When a lead is expecting to be contacted, a company may assign the lead to a particular reseller or salesman who may not contact the lead in a timely manner, or may not contact the lead

at all. Many companies do not have efficient systems and methods in place to track leads. Therefore the risk of reducing the company's good will because a lead is not properly or quickly contacted is a significant concern.

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Another problem with conventional systems and methods is that a lead is often given to multiple resellers since no efficient techniques exist for matching the lead with a reseller and since no efficient follow-up system is in place. It is not uncommon for a lead to be contacted by many resellers which may bother the lead.

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In addition, the large list of leads generated by such companies is of significant value to many resellers of products or services. However, these companies have no way of efficiently finding a reseller or salesman who is interested in receiving the lead. Another problem is that the company generating the leads may want to receive some compensation or benefit for each lead that results in a successful sale. Currently the company generating leads must rely on the reseller or salesman to accurately disclose the results of the leads. Another problem is that the lead aggregators may want to perform some pre-screening and pre-qualification of the reseller and/or the leads to make sure that the leads are matched with appropriate resellers. For example, a quality lead, e.g., a lead that may be the source of significant sales, should be matched with a high quality

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reseller. Currently, such matching is difficult and time consuming and, therefore, is rarely done.

Another problem with conventional systems is that resellers
5 typically must contact the lead without any introduction. This cold-call makes the reseller's task more difficult. Currently, there is no efficient way of introducing leads to resellers.

Such conventional systems and methods for identifying and
10 processing leads are inefficient and inaccurate. They do not enable leads to be efficiently identified, they permit a large number of leads to become cold, they permit a large number of leads to not be contacted, have no system or method in place to verify when a lead is contacted, and they do not have an
15 efficient system or method for accurately reporting results of the contacts.

Accordingly, what is needed is a system and method that (1)
enables leads to be efficiently identified by an interested
20 partner, salesman, or reseller; (2) reduces the number of leads that become cold; (3) motivates a reseller to promptly contact the lead; (4) automatically provides feedback to the lead and/or to the source of a lead when a reseller selects a lead and when the reseller processes the lead; (5) provides a system and method
25 for automatically evaluating the result of a contact; (6) automatically increases the accuracy of the reporting of results; and (7) automatically introduces the reseller to a lead.

SUMMARY OF THE INVENTION

5 The invention is a system and method for efficiently, accurately, and inexpensively receiving, assigning, and tracking leads. In one embodiment, the invention enables leads to be efficiently identified by an interested salesman or reseller by providing a database of leads that can be searched according to a
10 variety of parameters. In one embodiment, the invention also reduces the number of leads that become cold by quickly and efficiently matching sources of leads with a variety of salesmen/ resellers/users who are interested in utilizing a lead. In one embodiment, the present invention motivates a reseller to
15 promptly contact a lead that the reseller selects by limiting the amount of time that a lead is available exclusively to the reseller. The reseller must contact the lead before the lead becomes available again to other resellers. In one embodiment, the invention also automatically provides feedback to the lead
20 and/or to the source of a lead when a reseller selects a lead and when the reseller processes the lead in order to increase the accountability of the reseller. In an embodiment, the invention also provides a system and method for automatically evaluating the result of a contact which enables the lead source to better
25 track the results of providing leads. In an embodiment, the present invention also automatically increases the accuracy of the reporting of results by automatically sending the results of

the contact, as reported by the reseller, to the lead, the system administrator, and to the lead source. In addition, the present invention automatically introduces the reseller to a lead before the lead is contacted by the reseller.

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BRIEF DESCRIPTION OF THE DRAWINGS

Figure 1 is an illustration of a computer environment in which the present invention can operate.

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Figure 2 is a flowchart illustrating a method of selecting and processing a lead according to the preferred embodiment of the present invention.

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Figures 3a and 3b are flowcharts illustrating a method of selecting a lead according to the preferred embodiment of the present invention.

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Figure 4 is a flowchart illustrating a method of processing leads according to the preferred embodiment of the present invention.

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Figure 5 is an illustration of a computer screen display available to a user according to one embodiment of the present invention.

Figure 6 is an illustration of a computer screen display showing a lead search result according to one embodiment of the present invention.

5 Figure 7 is an illustration of a computer screen display showing a summary of selected leads according to one embodiment of the present invention.

10 Figure 8 is an illustration of a computer screen display showing additional detail of a selected lead according to one embodiment of the present invention.

15 Figure 9 is an illustration of a computer screen display showing how a user provides feedback about lead results according to one embodiment of the present invention.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENTS

20 A preferred embodiment of the present invention is now described with reference to the figures where like reference numbers indicate identical or functionally similar elements. Also in the figures, the left most digit of each reference number
25 corresponds to the figure in which the reference number is first used.

The invention is directed toward a system and method for efficiently, accurately, and inexpensively receiving, assigning, and tracking leads. In one embodiment, the invention enables leads to be efficiently identified by an interested salesman or reseller by providing a database of leads that can be searched according to a variety of parameters. In one embodiment, the invention also reduces the number of leads that become cold by quickly and efficiently matching sources of leads with a variety of salesmen/ resellers/users who are interested in utilizing a lead. In one embodiment, the present invention motivates a reseller to promptly contact a lead that the reseller selects by limiting the amount of time that a lead is available only to the reseller. If the reseller does not contact the lead before the time limit expires, the lead becomes available again to other resellers. In one embodiment, the invention also automatically provides feedback to the lead and/or to the source of a lead when a reseller selects a lead and when the reseller processes the lead in order to increase the accountability of the reseller. In an embodiment, the invention also provides a system and method for automatically evaluating the result of a contact which enables the lead source to better track the results of providing leads. In an embodiment, the present invention also automatically increases the accuracy of the reporting of results by automatically sending the results of the contact, as reported by the reseller, to the lead, the system administrator, and to the lead source. Not all of the above features and elements are necessary for the operation of the invention, instead the

features listed above include some of the features in the numerous embodiments of the invention.

Figure 1 is an illustration of a computer environment in which the present invention can operate. This embodiment includes a client computer 140 and a server computer 102. As described below, this is one example of the computer environment and is not intended to limit the scope of this invention. The server 102 includes a processor 106, an input/output (I/O) unit 108 and a conventional memory/storage unit 104. The processor 106 can be a conventional processor, e.g., a Pentium III processor that is commercially available from Intel Corporation, Santa Clara, California. The I/O unit 108 is conventional and permits the server 102 to communicate with other computers, networks, and peripheral devices, for example. The memory/storage unit 104 is a conventional memory/storage unit.

The memory/storage unit 104 includes a lead unit 110, a reseller unit 112, a lead control unit 114, a lead input unit 116, a lead status unit 120, a timing unit 122, an operating system unit 124, an administrative unit 130, an administrative control unit 126, a vendor unit 132 and a vendor control unit 134. The operation of these units is described below.

The server 102 is connected to a wide area network (WAN) 135. As described below, this is only one embodiment of the invention. The WAN 135 is coupled to the client 140 which may be

located at a site remote from the server (but need not be in alternate embodiments). The client includes a conventional processor 142 an I/O unit 144 and a memory storage module 150 that includes software such as the lead request unit 152 that is

5 described in greater detail below.

The memory/storage modules 104, 150 can be conventional memory devices, e.g., random access memory (RAM), read only memory (ROM), a floppy disk, a compact disc ROM (CD-ROM), a

10 compact disc recordable disk (CD-R/W), or a digital versatile disk (DVD), for example.

Figure 1 illustrates one embodiment in which the present invention can operate (a client-server environment). However,

15 many other computer system environments can be used. For example, it will be apparent to persons of ordinary skill in the art that the entire invention can be part of a single computer or can be part of a local area network. In addition, the individual units can be performed on separate computers instead of only a

20 single server, and some of the functions can be distributed to one or more computers, e.g., the client 140, described above. In addition, the invention can be part of any computer system, e.g., a personal digital assistants (PDA), such as a conventional Palm Pilot, that is commercially available from 3Com, in Santa Clara,

25 California, a mobile phone, or any type of computing device. The connections may be wireline or wireless. It will be apparent

that many different types of computer based environments may be used without departing from the scope of the present invention.

As described above, the present invention addresses a variety of problems of finding, distributing and processing leads. In one embodiment, a lead source sends a set of leads to a system administrator (via the administrative unit 130) who places the leads into the lead unit 110, e.g., a database. This process can also be performed automatically. The lead unit 110 can include leads from many lead sources. As described above, the lead source can identify the leads based upon a wide variety of techniques such as mail registration, Internet registration, electronic mail requests, etc. A reseller, who can also be referred to as a salesman or user, is a person who utilizes the system to locate leads. The operation of the invention is now described with respect to these participants.

Figure 2 is a flowchart illustrating a method of selecting and processing a lead according to the preferred embodiment of the present invention. The reseller selects 202 a lead. A more detailed description of this selection process is set forth with respect to figures 3a and 3b. Figures 3a and 3b are flowcharts illustrating a method of selecting 202 a lead according to the preferred embodiment of the present invention. When selecting 202 a lead, the reseller first requests 302 a list of potential leads. The reseller can use a variety of variables or parameters to reduce the number of leads that will appear in the list. For

example, the reseller can request leads associated with a particular product and/or in a specific geographical location. It will be apparent that many different parameters can be associated with leads and the examples described herein are merely illustrative. In the preferred embodiment the number of selected but not-processed leads can be limited in order to prevent the hoarding of leads and to encourage resellers to quickly contact and process a lead. In addition, there may be other requirements that the reseller must meet in order to select leads.

The present invention may also perform some pre-screening of leads. The lead control unit 114 performs a matching operation by contacting the reseller control unit 118 which searches the attributes of the resellers and matches the reseller's interests with attributes of the lead. For example, attributes of the lead such as the product they are interested in are matched to the reseller's interest and qualifications in order to match the interests of the lead with the reseller.

The administrative unit 130 in conjunction with the reseller unit 112 and the reseller control unit 118 determines whether the reseller is permitted to select leads. If not, the reseller is informed of the reasons for not being able to select leads, e.g., too many outstanding selected and non-processed leads, and the process continues. At this point the reseller may

be permitted to process some of the selected leads using the techniques described below.

If the reseller is permitted to select a lead, the lead control unit 114 creates 308 a lead list from a set of active leads in the lead unit 110. This set may, optionally, be a subset of the total active set based upon the requirement that one or more parameters be satisfied, as describe above. The reseller may decide 310 that the set is too broad or is too narrow and can modify 312 the set to account for different parameters of the leads in which case the lead control unit 114 creates 308 another set of leads based upon the updated parameters. The reseller may select 314 one or more leads from any of these lead lists and may continue 315 to modify 312 the set and select 314 one or more leads until they reach their lead limit.

One feature of the present invention is that when a lead is selected the administrative unit 130 receives the selected lead from the lead control unit 114 and automatically sends 316 a confirmatory indicator, e.g., an e-mail, to the reseller which confirms the selection. In addition, the administrative unit 130 automatically sends 320 a notification to the lead informing the lead that they have been selected. This notification serves several functions. Specifically it provides an introduction of the reseller to the lead and informs the lead that they should expect to be contacted by the lead. This serves to increase the

chance of a successful contact by eliminating the need for the reseller to cold-call the lead and it also provides an incentive to the reseller to contact the lead in a timely manner since the lead is expecting to be contacted. This notification may also

5 include "cross-selling," e.g., providing information about other relevant products or services that may be of interest to the lead. Cross-selling information may be provided by the lead source, system administrator and/or reseller. In some

embodiments the administrative unit 130 automatically sends 320

10 the lead the name of the reseller and provides to the lead a time period in which the lead should expect to be contacted by the reseller. In addition, the administrative unit automatically sends 320 a notification to the reseller control unit 118

identifying the lead and the time of selection. This feature of

15 the present invention provides motivation to the reseller to quickly contact a lead because the lead is aware that they have been selected. In addition, as described below, in one

embodiment, the time period in which the reseller can maintain the lead exclusively is limited. That is, the time period in

20 which the lead is not in the active set of leads is limited. The reseller control unit 118 receives an indication of the selection and stores the selected lead information along with the selection time in the reseller unit 112.

25 The lead control unit 114 provides 322 additional information about each selected lead to the reseller. This additional information can include but is not limited to specific

contact information such as a contact name(s), company name, website, phone number, fax number, address, e-mail address, origin of lead, origination date of lead, product interest(s), language, and lead company information. The lead control unit 114 then automatically 324 removes the selected lead(s) from the active set of leads and places them in a ``selected'' set of leads. Only those leads that are in the active set of leads can be selected by another reseller. As will be described in greater detail below, the administrative unit 130 in conjunction with the timing unit 122 may limit the amount of time an unprocessed lead is removed from the active set of leads.

The order of operation described above and illustrated in Figures 3a and 3b is one example of the method of the present invention. In alternate embodiments the order of steps may differ. For example, the lead control unit 114 can provide additional information to the reseller before the confirmation and notifications are sent 316, 318.

Referring again to Figure 2, after the reseller selects 202 a lead, the administrative unit 130 determines 204 whether a time limit for processing the lead is approaching. The administrative unit 130 can perform this periodically in order to identify when the time limit arrives, e.g., checking every day, hour, minute, second or continuously, for example. If the time limit is approaching, e.g., if the time-limit is one day away, the administrative unit 130 sends 206 a reminder to the reseller

indicating that the lead should be processed before a deadline. In alternate embodiments, no warning is sent and the administrative unit 130 in conjunction with the timing unit 122 determines 208 whether the processing time limit has expired. If the processing time limit has expired the lead control unit 114 in response to the administrative unit 130 automatically places 212 the lead into the active set of leads by, for example, changing a flag value of the lead. The administrative unit 130 also automatically sends 214 a notification to the lead, e.g., via an e-mail message or facsimile. In addition, the vendor unit 132 may automatically notify the the lead source (lead aggregator). The administrative unit 130 may also contact the reseller automatically or may contact a system administrator to inquire as to why the lead was not contacted and processed. The administrative unit 130 also instructs 216 the reseller control unit 118 to store this expiration information in the reseller unit 112. This information can be used to provide feedback to the reseller and the lead source, for example. The feature of limiting the time period in which a selected lead is taken off the active set of leads reduces the number of leads that become cold and motivates a reseller to promptly contact the lead since after the time period expires the lead will become available to the rest of the resellers. If the processing time limit has not expired the reseller may process 210 the lead.

Figure 4 is a flowchart illustrating a method of processing leads according to the preferred embodiment of the present

invention. After contacting a lead (or attempting to contact a lead), the reseller can proceed to process the lead. The reseller chooses 402 one of the previously selected leads to process and identifies 404 the result for the selected lead. The user may select one of a predefined set of results such as ``sale," ``no interest," ``evaluation," and ``project,". For example; an ``evaluation" result means the lead is evaluating a product and/or lead sales information. In an embodiment, the system may require a fixed time limit for the ``evaluation". The ``evaluation" result may only be chosen once per lead. Once the evaluation time limit is over, the reseller may process and identify 404 the result for the lead. A ``project" result identifies a lead that may be using the product(s) in a larger project and further sales follow-up may be needed. In an embodiment, the system may follow-up on leads that are processed with a ``project" result.

In alternate embodiments, the reseller can enter a description of the result and/or a combination of a predefined set of results. Accordingly, once the reseller enters the result information the present invention automatically processes the result and sends the above described confirmation and notification.

As described above, a feature of the present invention is that it automatically increases the accuracy of the reporting process when compared to conventional systems and methods. The

present invention accomplishes this by automatically sending 404 a confirmation of the processing result to the reseller and by automatically sending 410 a notification of the result to the lead and to the administrative unit 130. It is unlikely that a reseller would misrepresent or otherwise intentionally process an inaccurate result knowing that the lead will be notified of the result. Accordingly the present invention increases the accuracy of the reports.

10 The lead control unit 114 then automatically places the selected and processed lead into a "processed" set of leads by changing a flag value associated with the lead, for example. The leads in the processed set are not available to be selected by resellers unless, in some embodiments, they are independently received into the system again via the lead input unit 116. The reseller control unit 118 then stores 414 the processed result with the reseller record in the reseller unit 112 and/or the lead unit 110.

20 As described above, leads can be input into the system using a variety of techniques via a lead input unit 116. In general, a lead source will have the necessary lead information in a storage device, e.g., a hard disk drive, and will transfer the lead data from the lead source's storage device to the lead unit 110 via the lead input unit 116. The lead input unit may translate information and reformat the lead data to match the format of the lead data. Many different formats may be used without departing

from the scope of the present invention. In addition many different techniques are available for transferring the data from the lead source's storage device to the lead unit, e.g., over the Internet, and such techniques will be apparent to persons of
5 ordinary skill in the art.

In addition, in the preferred embodiment, the reseller, lead source and the lead can check the status of the lead using any one of a variety of techniques. In the preferred embodiment the
10 lead status request will provide the current selection status of the lead (active, selected, processed) and if processed the result of the processing and the reseller. It will be apparent that additional information may be presented during a status request.

One embodiment of the present invention is described using computer screen displays set forth in Figures 5-9. This example describes the lead selection and processing aspects of the invention and is described with reference to Figures 2-4. The
15 scope of the claimed invention is not limited by this preferred embodiment. Figure 5 is an illustration of a computer screen display available to a user according to one embodiment of the present invention. A reseller connects to the system, e.g., over a network, e.g., a WAN 135 such as the Internet or an intranet,
20 telephone network or faxnet, for example. A screen is displayed to the reseller giving the reseller a variety of options such as selecting a new lead, processing (providing feedback on) a lead,

or various administrative options, for example. After requesting 302 to select a lead, the reseller is presented with the ability to execute a search of all of the leads in the lead unit 110. As described above, the reseller can request to execute a search

5 command using a variety of different parameters in many different fields. In this example, the fields are ``Date," ``Company," ``City," ``State," ``Vendor," and ``Product," as shown in Figure 6. Figure 6 is an illustration of a computer screen display showing a lead search result according to one embodiment

10 of the present invention. From the list of leads the reseller selects 314 one or more leads. In this example, the reseller can use a computer keyboard or a pointing device to select the lead by giving an indication in the ``Select" box. Such an indication can be by using a conventional pointing device and

15 ``clicking" on the select box 602. In addition, this page provides the reseller with information about the number of active leads they have and the number of leads that the reseller may select. In this example, the reseller has four active leads and can select up to six additional leads.

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Figure 7 is an illustration of a computer screen display showing a summary of selected leads according to one embodiment of the present invention. In this example, this page can be accessed by selecting the active leads button 702. The selected

25 contacts are automatically sent 320 a notification that the reseller will be contacting them. As described above, when compared to conventional systems this reduces the chances that a

contact will become cold while providing a motivation to promptly contact the lead. The system then provides additional information about the selected leads to the reseller. Figure 8 is an illustration of a computer screen display showing

5 additional detail of a selected lead according to one embodiment of the present invention. This information is used by the reseller to contact the lead. If necessary, the reseller, after seeing the additional information, can de-select a lead. In this situation the lead will be placed back into the active set of leads.
10 An additional notification may be automatically or manually sent to the lead and the de-selection may be stored in the reseller's record in the reseller unit 112.

After contacting the lead, the reseller may process 210 the lead. Figure 9 is an illustration of a computer screen display showing how a user provides feedback about lead results according to one embodiment of the present invention. In this example, each of the selected leads is listed and a drop-down box is available under the "Status" field which enables the reseller
15 to select one of several options. In this example, the options include "Purchased," "No Interest," and "Project." The user selects the proper result and then selects the "submit" button on the computer screen.
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25 In addition, the present invention can automatically prepare reports. The reports provide a timely and accurate method for the reseller, the administrator and/or the vendor or lead source

to check the status and/or history of leads. Reports may be presented in one or more formats, e.g., tabular, graphs, on a computer display, and/or as print-outs. In an embodiment, a report may include but not be limited to information about the number of leads processed, the number of leads converted to sales, the number of leads in active use and the number of leads processed by a reseller. In the preferred embodiment, reports automate the process of providing accurate, timely feedback to the vendor, lead source or lead. The vendor control unit 134 controls the content of a report so that a vendor or lead source will only be able to access information about leads that they have provided. The reseller control unit 112 controls the content of reports so that each reseller sees reports only about their active and processed leads.

While the invention has been particularly shown and described with reference to a preferred embodiment and several alternate embodiments, it will be understood by persons skilled in the relevant art that various changes in form and details can be made therein without departing from the spirit and scope of the invention.